



Filing ID #10023853

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Nathan I Kleinman  
**Status:** Congressional Candidate  
**State/District:** NJ02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 06/1/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Boston Partners All-Cap Value Instl Fd #7007 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Clearbridge Large Cap Value C1 I Fd #3 [MF]		\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Driehaus Emerging Mkts Growth Instl Fd #23 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Federated Clover Small Value Cl Is Fd #659 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Federated Government Obligation Fund #5 [BA]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Janus Henderson Enterprise Cl I Fd #102 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
JPMorgan US Small Company Cl L Fd #1384 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Oakmark Intl Instl Fd #2886 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Oppenheimer Intl Growth Cl I Fd #1961 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ BOSTON PARTNERS ALL-CAP VALUE INSTL FD #7007 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ CLEARBRIDGE LARGE CAP VALUE CL I FD #3 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ DRIEHAUS EMERGING MKTS GROWTH INSTL FD #23 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ JANUS HENDERSON ENTERPRISE CL I FD #102 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ JPMORGAN US SMALL COMPANY CL L FD #1384 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ OAKMARK INTL INSTL FD #2886 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ OPPENHEIMER INTL GROWTH CL I FD #1961 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ T ROWE PRICE BLUE CHIP GROWTH FD #93 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ VANGUARD SHORT TERM BOND INDEX ADM FD #5132 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ VANGUARD VALUE INDEX ADM FD #506 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ VICTORY SYCAMORE ESTABLISHED VALUE CL I FD #203 [MF]		\$1,001 - \$15,000	Tax-Deferred		
T Rowe Price Blue Chip Growth Fd #93 [MF]		\$15,001 - \$50,000	Capital Gains	\$1 - \$200	\$1 - \$200
The Farm [FA]		\$100,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
<div>\$250,000</div> <div>LOCATION: Plymouth / Chenango, NY, US</div> <div>DESCRIPTION: Purchased farm on April 2nd, 2018. It is a long-term investment, presently fallow, with some young fruit and nut trees. It has no official name yet, but has been referred to as "The Farm", so that is used here. See mortgage information in Schedule D.</div>					
Vanguard Value Index Adm Fd #506 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Victory Sycamore Established Value Cl I Fd #203 [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

None disclosed.

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Ann and Walter Allport	April 2018	Farm mortgage	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Director (Board Member)	Jewish Social Policy Action Network
Director (Board Member)	The Experimental Farm Network Cooperative
Director (Board Member)	Project for Nuclear Awareness, Inc.
Director (Board Member)	GMO Free Pennsylvania
Advisory Committee Member	Roughwood Seed Collection
Advisory Committee Member	The Non-GMO Project

### SCHEDULE F: AGREEMENTS

None disclosed.

### SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Roth IRA

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## COMMENTS

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Nathan I Kleinman , 06/1/2018